

for you
to look over

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cc:

Subject: 1999 OH Valley Regional meeting Action Items

CASUALTY:

The Casualty Department will put together a document clearly defining their umbrella appetite. Target = January.

[Check] → 10/2

PROPERTY/MARINE:

A committee consisting of Michael Whitman, Eleanor Faulkner and Connie Smothers will put together a regional gameplan for the staffing, processing and training necessary to insure superior service to our agents. Target = January.

April

BOILER AND MACHINERY:

Diane will put together a bookroll strategy that will consist of the operational procedures that will be needed to insure that the bookroll is done smoothly. Target = First week in January

COMMERCIAL INSURANCE DIVISION:

→ Dieter asstd branches
→ Cleveland, etc.

Dieter will put together a document identifying our problems with the ASC unit in the region. Dieter and I will work with Mark Mileusnic to get a gameplan together to fix the unacceptable scenarios. Target = January

Dieter will research to determine if we can fix the UM/VI prior to the March ISO rollout. → Done

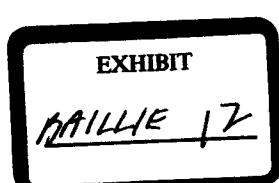
TECHNOLOGY INSURANCE GROUP:

Jim Kerns will have an Ohio Valley regional TIG plan completed and sent to all branches by December 1. A finished gameplan will be completed by the first week in January.

ENERGY:

Account management plans will be completed and sent to the appropriate branch managers for all accounts over 100,000 by December 15.

→ Target 2
→ 10/15
→ Done 10/15



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DEPARTMENT OF FINANCIAL INSTITUTIONS:

A training plan for the entire region will be put together by December. *→ 2 weeks*

Account management plans will be completed and sent to the appropriate branch managers by December 15. *→ Dec 15*

EXECUTIVE PROTECTION:

EP and DFI will put together a travel plan for year 2000. Target date = December. *→ Not done*

By January John O'Mara will have the product managers scheduled to present to the in-house in-district sales force on the products for Executive Risk.

SURETY:

Marc Pennell will give the appropriate branch managers a list of the backup accounts that they are on and the agents. *→ 2 weeks*

CUSTOMER SERVICE DEPARTMENT:

Authority statements for CSRs will be completed by February. *→ CDR 16 days*

Regional training will be expanded to Executive Protection and Marine. Gameplan to be completed by February. *→ 2 weeks*

A strategic quality improvement gameplan will be put together by January. *→ 2 weeks*

Terry Cavanaugh (Doug) will be contacted to determine the future of the AIM system. Target date = December. *→ Mem 6 →*

CLAIMS BUSINESS CONSULTANT:

All account management plans will be completed by December and a copy of any that involve claims coordination will be sent to Pam.

LOSS CONTROL:

A regional marketing plan will be put together by Mike Zdinak. Target date = January

MARKETING:

Jeff will contact all agents enrolled in Mountain View Indemnity and identify him as the point person for all procedural and technical questions involved in the future management of this project. Target = December. *→ Talk to them on [Plan] → MVI*

HUMAN RESOURCES:

Diane will send out a memo to all branch and regional managers outlining available inside and outside courses and how to obtain information from them. Target date = December. *→ 10/1*

All regional and branch managers will submit a list of business and leadership skill training that they wish their direct reports to take in the year 2000. This should be submitted to Diane by January.

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If there are any corrections, deletions or additions that anyone wishes to insert, please do it via this e-mail. I thank all of you for a very productive and energetic meeting. Let's all make a good efforts towards completing these necessary action items and thus improve the performance of the region. We now have the people, skills and directions to be a world class business unit. Hard work and implementation of our goals will ensure success.

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